Attachments are limited to 5m each.

All notes and attachments become part of the official record for that document. **DO NOT** include in notes or attachments any data that is of a sensitive nature. This would include social security numbers, W9 information, bank routing and/or account numbers and credit card numbers.

Notes and attachments may be added to a document at any time, including after the document is in a final status.

Notes and attachments **ARE NOT** copied when a document is copied. If the notes or attachments from the old document pertain to the new document, they must be added to the new document.

Notes and attachments cannot be deleted once they are added to the document.

9 digit numbers in the format 123456789 or 123-45-6789 may not be input. This edit is in place as the note area is not secure and 9 digit numbers mirror Social Security numbers. If you need to input a 9 digit number in the notes, modify the pattern to include a space or dash. Examples 1-23456789 or 1 23456789.

**Contact**

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